Sonoma County: Building TouchPoints

Social Solutions

Welcome!

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Agenda

TOUCHPOINTS

CREATE TOUCHPOINTS

EDIT TOUCHPOINTS

MULTIPLE PARTICIPANT TOUCHPOINTS

Learning Objective

Prepare ETO Administrators to successfully manage and maintain TouchPoints. Administrators should leave the training with the basic understanding of creating and editing TouchPoints.

TouchPoints

TouchPoints

A form that captures data regarding services, demographics, and change.

TouchPoint Subjects

- Single & Multiple Participants

- Single & Multiple Entities

- Single & Multiple Families

- Collections

- General (Program Specific)

- Anonymous

What is a TouchPoint

Questionnaires that typically fit into one of the following categories:

- More detailed set of questions that are a continuation of demographics

- A form that includes weighted questions (on knowledge, attitude, behavior etc.) that can be tied to outcomes.

- Capture time spent providing service, either individually (case management) or to a group of participants (attendance). In ETO language, efforts are recorded into TouchPoints.

TouchPoints

3 steps to creating new TouchPoints.

1. Create the TouchPoint
2. Create the data elements
3. Set the security

TouchPoints

Step 1: Create the TouchPoint

Site Administration > Manage Touchpoints > New TouchPoint Button

TouchPoints

Step 1: Create the TouchPoint

TouchPoint Wizard

[Cancel] [Save]

TouchPoint Name*

[   ]

Tags

[   ]

ℹ️ *Separate each tag with a space: outcome service effort. Or, to join two words together in one tag, use double quotes: "participant outcome".*

Identifier
- ⚪ Use current program name as Identifier
- ⚪ Automatically generate Identifier
  - ☐ Use the same Identifier when pre-populating with previously recorded data
- ⚪ Allow user to create Identifier
  - ☐ Require Identifier
- ⦿ None

Section Quick Links
☐ Enable section quick links on each page

Question Numbering
☐ Use question numbering for each element

Update Period
☐ Limit the update period to [30] days after the user specified date taken field (this is the date the user enters at the top of the record TouchPoint screen)
☐ Limit the update period to [   ] days after the date specified in [⌄]
The lowest role allowed to override the update period restrictions is [Enterprise Manager ⌄]
When the response is locked display [System locked]

Advanced Date Formatting
☐ Restrict date taken to [1] days in the future from the actual (audit) date when recording
☐ Restrict date taken to [1] days in the past from the actual (audit) date when recording
☐ Don't allow the date to be outside of a program enrollment when recording

Date Taken Blank by Default ❔
☐ Make the date taken field blank by default

Record TouchPoint for/as Another Staff Account
☐ Allow a user completing this TouchPoint to select another user to receive credit (both users will receive credit)

Save as Draft
☐ Allow a user to save as Draft when recording the TouchPoint

Save Progress
☐ Allow a user to save their progress and continue recording the TouchPoint

Save and Record Similar
☐ Allow a user to save and record the same TouchPoint

Reporting ❔
☐ Disable Aggregation and Sequencing of response data for all elements.

Allow Fund and Asset Disbursement ❔
- ⚪ Provide user with both the option to "Save" and "Save and Disburse Asset"
- ⚪ Provide user with only the option to "Save and Disburse Asset"
- ⚪ No Fund Disbursement

TouchPoints

Step 2: Add Data Elements from the Edit TouchPoint screen

TouchPoints

Step 2: Add Data Elements

TouchPoint Wizard: Select an Element to Add to KM Workshop Attendance

[Cancel] [Continue]

Select element type*:

- ○ Section Header
- ○ Message/Instructions
- ○ Yes/No
- ○ List
- ○ Text
- ○ Numeric
- ○ Date of Next Contact
- ○ Page Break
- ○ Date
- ○ Start/End Time

- ○ Time Spent
- ○ Attendance
- ○ Address Field
- ○ Phone Number
- ○ National ID (SSN/SIN)
- ○ Email
- ○ Grid/Table
- ○ Signature
- ○ Electronic Signature
- ○ File Attachment

- ○ Entity Cross Reference
- ○ Entity Cross Reference Attribute
- ○ Participant Cross Reference
- ○ Demographics/Program Information
- ○ Element Cross Reference
- ○ Response Cross Reference
- ○ User Cross Reference
- ○ ETO Check-In
- ○ Family Cross Reference
- ○ Question Bank Element

[Cancel] [Continue]

TouchPoints

Step 2: Directional Tracking of data

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TouchPoints

Step 2: Question Settings

- Reorder Fields

- Calculations

- Conditional Rules

TouchPoints

Step 3: Setting TouchPoint Security

2 Parts to TouchPoint Security:

- Assign a subject type to the TouchPoint
- Grant access to the TouchPoint

TouchPoints

Step 3: Setting Security

Edit TouchPoint > Security

LIMITATION

If you forget to set up touchpoint security or make a mistake in setting it up – users will be prevented from accessing the touchpoint!

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TouchPoints

Step 3: Assign a subject type to the TouchPoint

TouchPoints

Step 3: Grant Access to the TouchPoint

LIMITATION

If the TouchPoint will be used for more than one subject type. You must select each subject and assign permissions - one at a time.

Check In

Write True or False in the chat in response to each statement.

- Touchpoints are automatically set up and available in ETO.

- You can format the text of a TouchPoint question to include COLORS!

- How you design a TouchPoint should depend on Best Practice & how you want to report on the data.

- Administrators have to choose who has permission to TouchPoints.

TouchPoints

Manage TouchPoints

Site Administration > Manage TouchPoints

- Admins can disable, delete, or edit the TouchPoint from the Manage TouchPoint page.

TouchPoints

Question Bank Questions

Site Administration > Question Bank

- Use in multiple TouchPoints. When the question is updated in the Question Bank, it will update in all the forms.

LIMITATION

Do not change the HMIS Template Touchpoints, they are preset to fulfill all requirements.

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Check In

Write True or False in the chat in response to each statement.

- You can build TouchPoints using the TouchPoint Wizard under the Wizards feature on the navigation bar.

- Security in ETO is not passive, you have to actively choose who has permission to view/edit/record/etc. a TouchPoint.

- When building a TouchPoint meant to be taken for more than one participant at a time, select Participant as the subject type.

- Write an example of a tag you might use for several of your organization's TouchPoints.

- You have to select the Subject of each TouchPoint.

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